

ARTICLE | Evolving Workforces

2024-2025 CBRE Global Workplace & Occupancy Insights



Part 2: Effective Hybrid Programs: Policies & Common Characteristics

Introduction

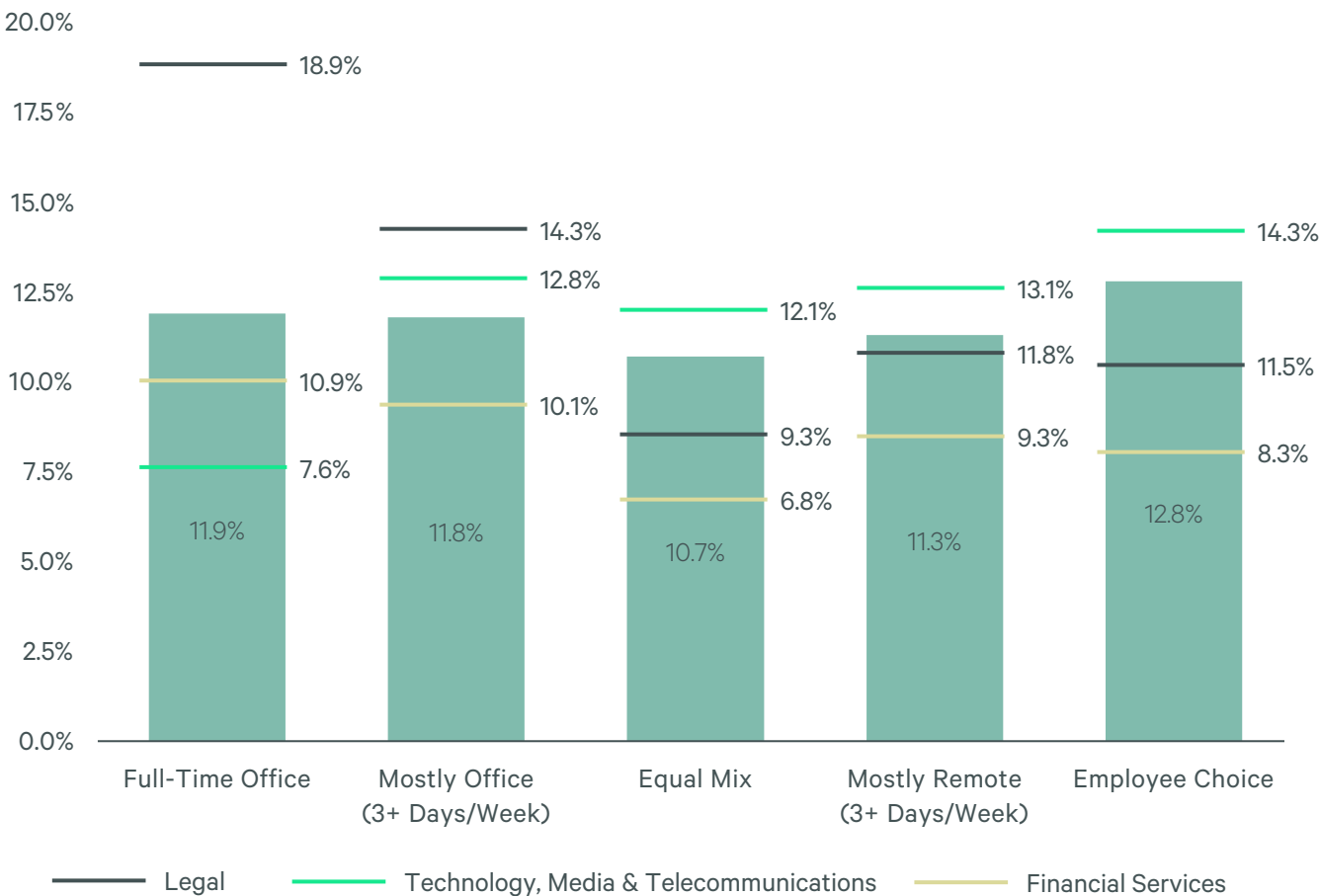
As organizations worldwide adapt to a post-pandemic environment, the hybrid work model has emerged as a preferred approach. Ninety-two percent of workplace policies now include hybrid programs—a significant increase from 71% just three years prior. This trend underscores a shift in workplace dynamics, where flexibility and in-person connectivity coexist.

A hybrid work model balances time working in and away from the office, recognizing that for knowledge workers, work transcends location, day of the week and time of day. While most organizations encourage some level of office attendance, employee demand for flexibility remains high.

The C-suite generally believes participation in shared experiences with colleagues in the office increases engagement and organizational loyalty. This is reflected in [CBRE's research](#) on workforce attrition by stated office attendance policies (which also notes that policy is only one factor influencing employee attrition).

Variability among industries highlights differences between various types of workers, life stages and work styles. Tech workers, who generally are earlier in their careers and tend to live in urban centers, have lower turnover when fully returning to the office. In contrast, lawyers, who tend to be more experienced workers later in their careers living in exurban and suburban settings, have the highest turnover under fully in-office policies. The industry statistics are closest to each other in the Mostly Office hybrid model, suggesting that this approach is a justifiable default position that balances executive priorities for in-person time with moderate flexibility. The data on which policies are most common bears this out.

FIGURE 1: Does employee turnover risk vary by industry sector?



Based on U.S. workforce data for 342 companies sourced through LinkedIn® Talent Insights.
Source: [U.S. Office Attendance Policies Midyear 2024](#).

Executive Embrace of Hybrid Policy

Over the last 12 months, office attendance policies have reached a plateau, with many companies reporting that they have reached a steady state of operation. The share of companies with a hybrid component of their program has risen two percentage points from 2023's 90%, and 21 percentage points from 2021's 71%. However, including a hybrid program in their workplace policy does not mean companies don't value in-person, in-office time. In fact, 57% of organizations prefer a "mostly office" hybrid model, requiring at least three days in the office, with none in our survey opting for a fully remote arrangement.

Large organizations (those occupying more than 3 million RSF) overwhelmingly embrace hybrid models. Most smaller organizations (those occupying fewer than 3 million RSF) also embrace hybrid, though a minority of executives at this size do not support these policies.

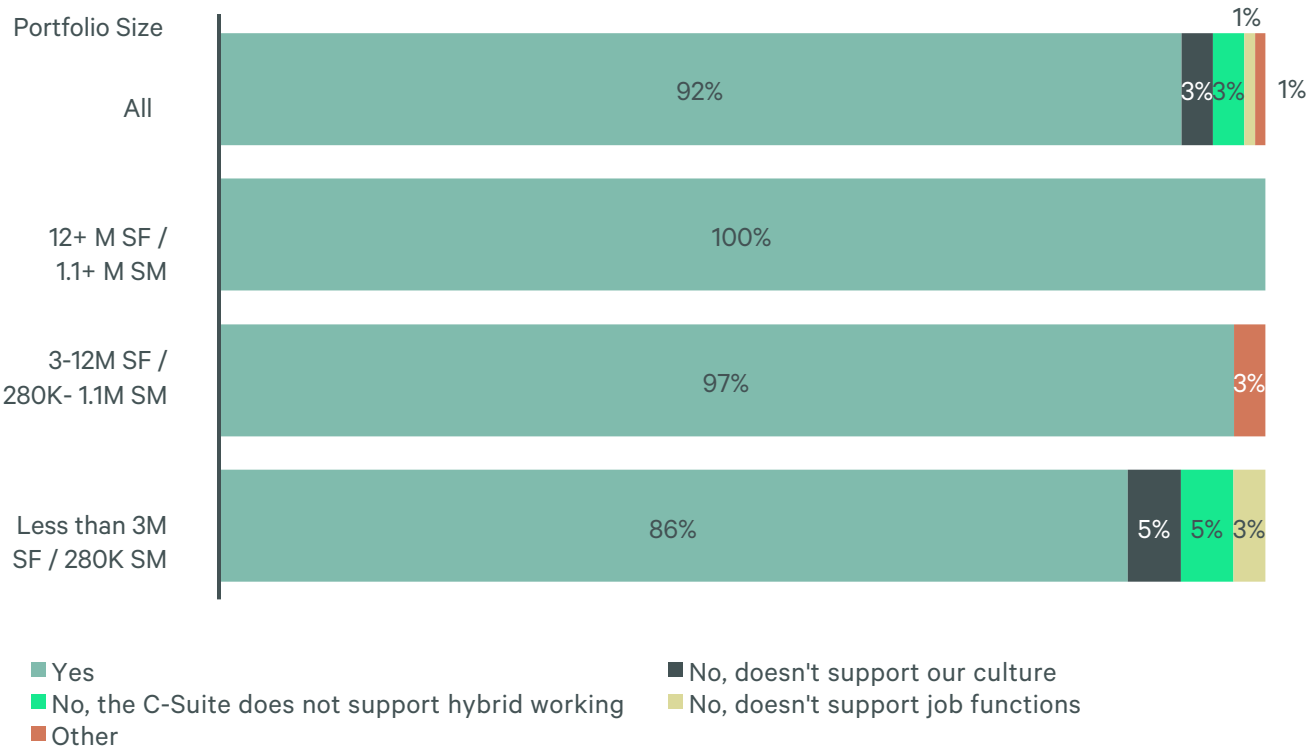
Share of companies with a hybrid program

92%

Companies that prefer a "mostly office" hybrid model

57%

FIGURE 2: Does the workplace policy include a hybrid work program?



Source: CBRE Workplace & Occupancy Benchmarking Program, 2024.

Underlying Benefits of Hybrid Policies

The benefits of hybrid work can be boiled down to a core theme: connectivity with flexibility. Employees appreciate the exposure and interactions that come from working in an office. Many of them, however, [want the autonomy](#) of occasional remote work. Employees are not only saving time and money by reducing commute days, but they are also utilizing that reclaimed time for childcare, exercise, additional work and home administration. However, the desire for in-person connectivity remains strong. This is reflected in the rates of attrition due to office attendance policies.

Attendance patterns reveal that Mondays and Fridays have significantly lower employee show-up rates compared with mid-week days. This suggests a newfound flexibility at the intersection of work and personal time that is likely to persist as employees prioritize work-life harmony.

The adoption of hybrid policies has enabled real estate portfolio evolution. The extent of this optimization depends on the structure of the portfolio and the ability to transact, modify and densify space. To get a sense for how much square footage savings occupiers have achieved, we developed three different estimates from three different samples:

Macro/Economy-Wide

10% reduction in space per person

This is calculated by dividing office-using employment by total occupied square footage nationwide.

Portfolio-Level Adjustments

15% reduction in space per person

This is derived from our Occupancy Survey, which considers entire portfolios of large corporate clients, which tend to be a mix of owned and leased locations.

Site-Specific New Builds

Averaging 30% reduction in space per person

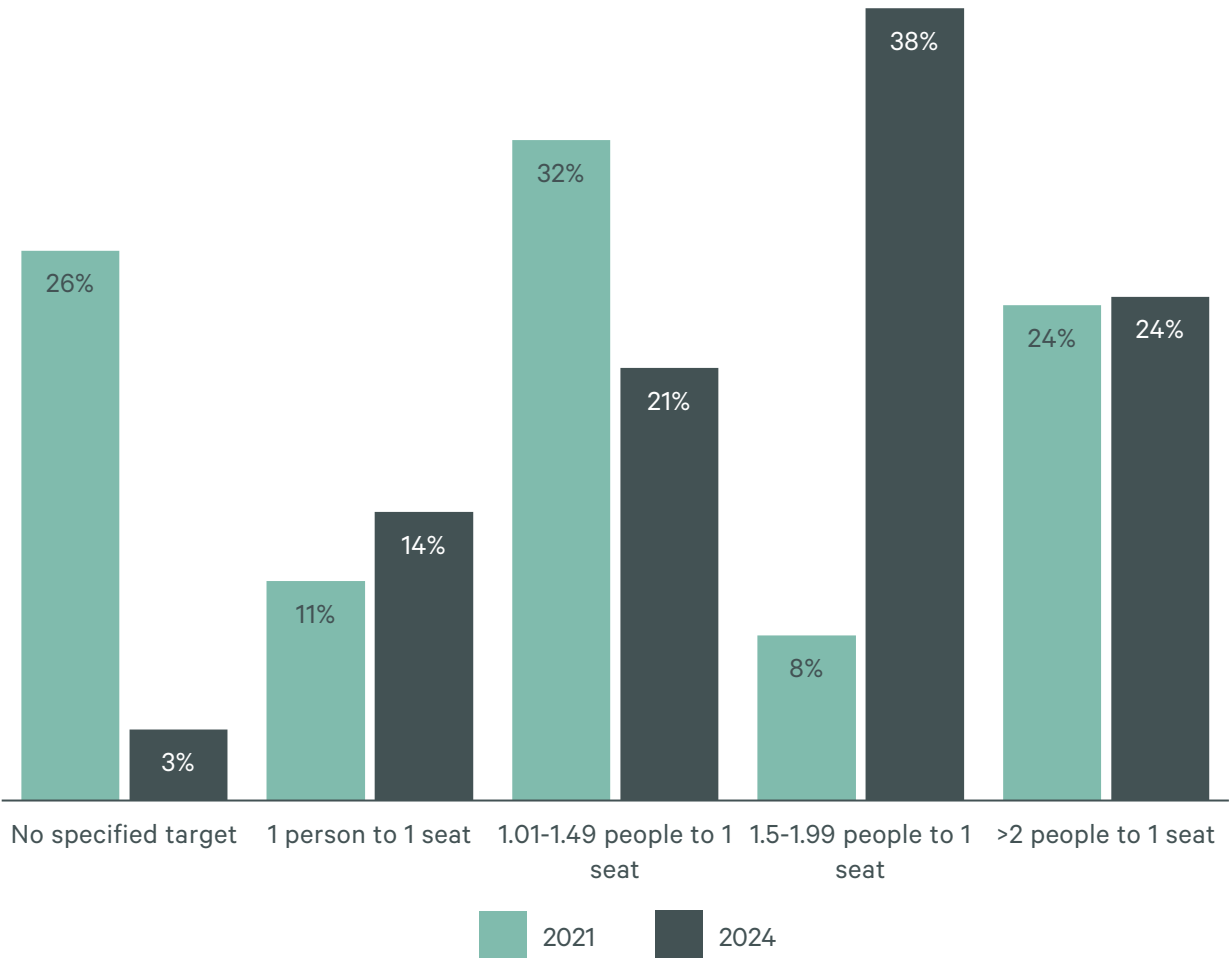
This sample is comprised of clients who are relocating to new premises. The 30% reduction reflects the change in space acquired once future growth is considered. This means that while in some instances organizations are taking more space, they are still taking 30% less space than they would have in comparison to their prior occupancy strategy when including projected growth.



Portfolio optimization is made possible by organizations implementing more on-demand solutions for employee accommodation on site. CBRE research shows that, for the first time, the number of people exceeds the seats provided within CBRE’s managed client portfolio. This allows companies to provide fewer total seats, which is both more efficient and creates a more vibrant on-site experience.

The economic impact within organizations is significant. Assuming a 10% space reduction is achieved across the average managed portfolio of 7.5 million RSF, at U.S. average rental rates, that would reflect an annual rent reduction of \$25-\$30 million.

FIGURE 3: Global Target Sharing Ratios, 2021 vs 2024



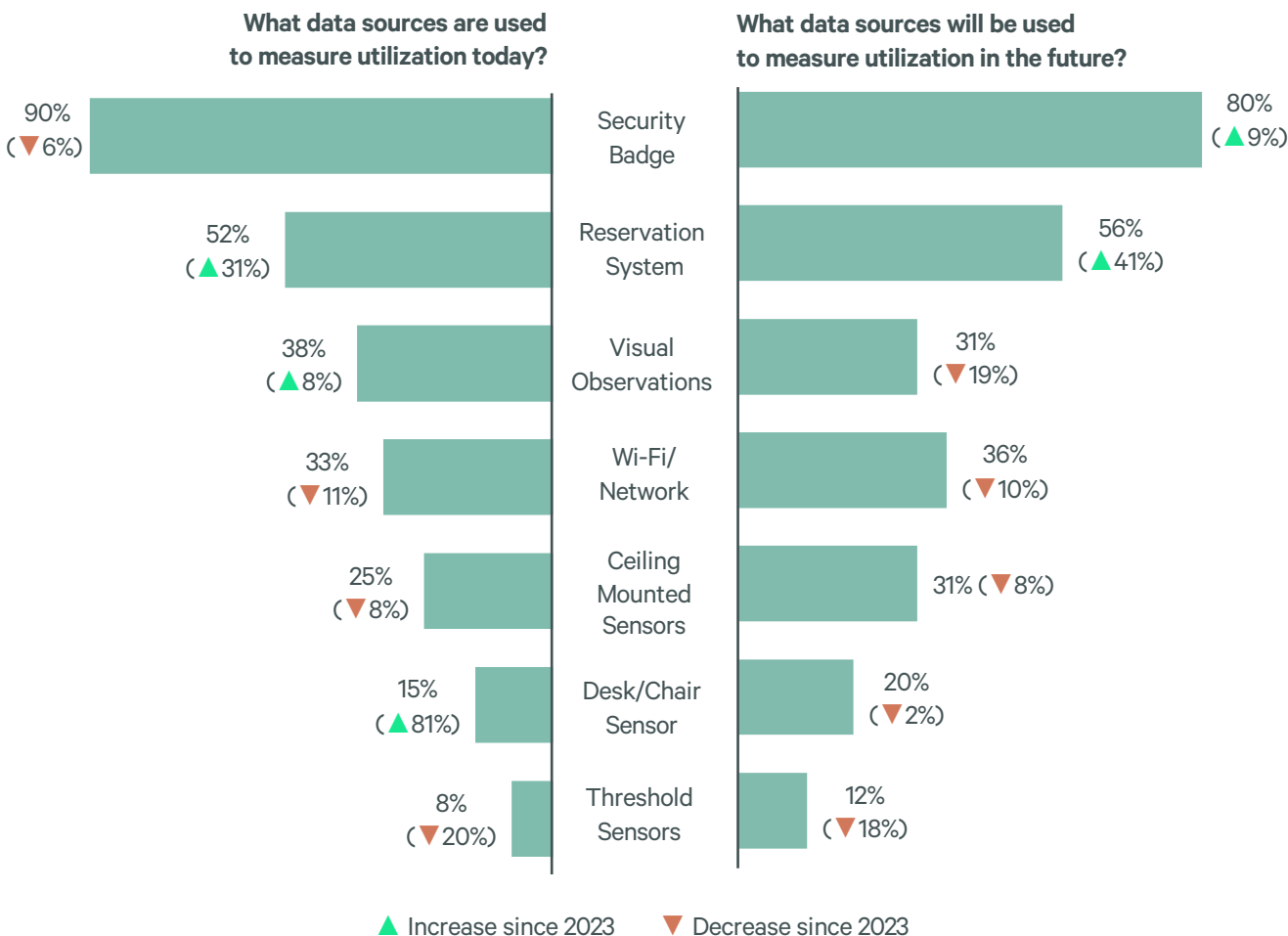
Source: CBRE Workplace & Occupancy Benchmarking Program, 2024.

Understanding Attendance Patterns & Measuring Hybrid Work Programs

Tracking Attendance and Utilization

Of organizations with hybrid policies that require employees to work from the office, about 60% track attendance, primarily through security badging. In general, 90% of organizations opt for this utilization tracking method, which has remained the most popular approach for the past four years, followed by reservation systems (52%) and visual observation (38%). The reliance on security badging reflects its effectiveness in providing real-time data on office utilization.

FIGURE 4: Sources of Utilization Data, Current and Future



Source: CBRE Workplace & Occupancy Benchmarking Program, 2024.

As we move forward in this hybrid work landscape, understanding attendance patterns and employee preferences will be crucial for organizations looking to optimize their workplace strategies. The following key metrics can aid decision making:

Daily Show-Up Rate and Vibrancy

Monitoring daily attendance at a single site and comparing it to the site's capacity can provide insights into how many vibrant workdays are occurring in the office. In simple terms, if an office is too empty, it isn't vibrant. A sweet spot for buzz and energy occurs when at least two-thirds of an office is occupied. If the office is in that sweet spot, we call it a "vibrant day." Measuring how many days are vibrant is a great way to track the performance of a workplace.

Distribution of Individual Show-Up Rates

Understanding how many employees are showing up four or more times per week versus those attending 2-3 times can inform seating strategies and space accommodations. This granular data can help organizations tailor their office layouts to better fit the needs of different teams.

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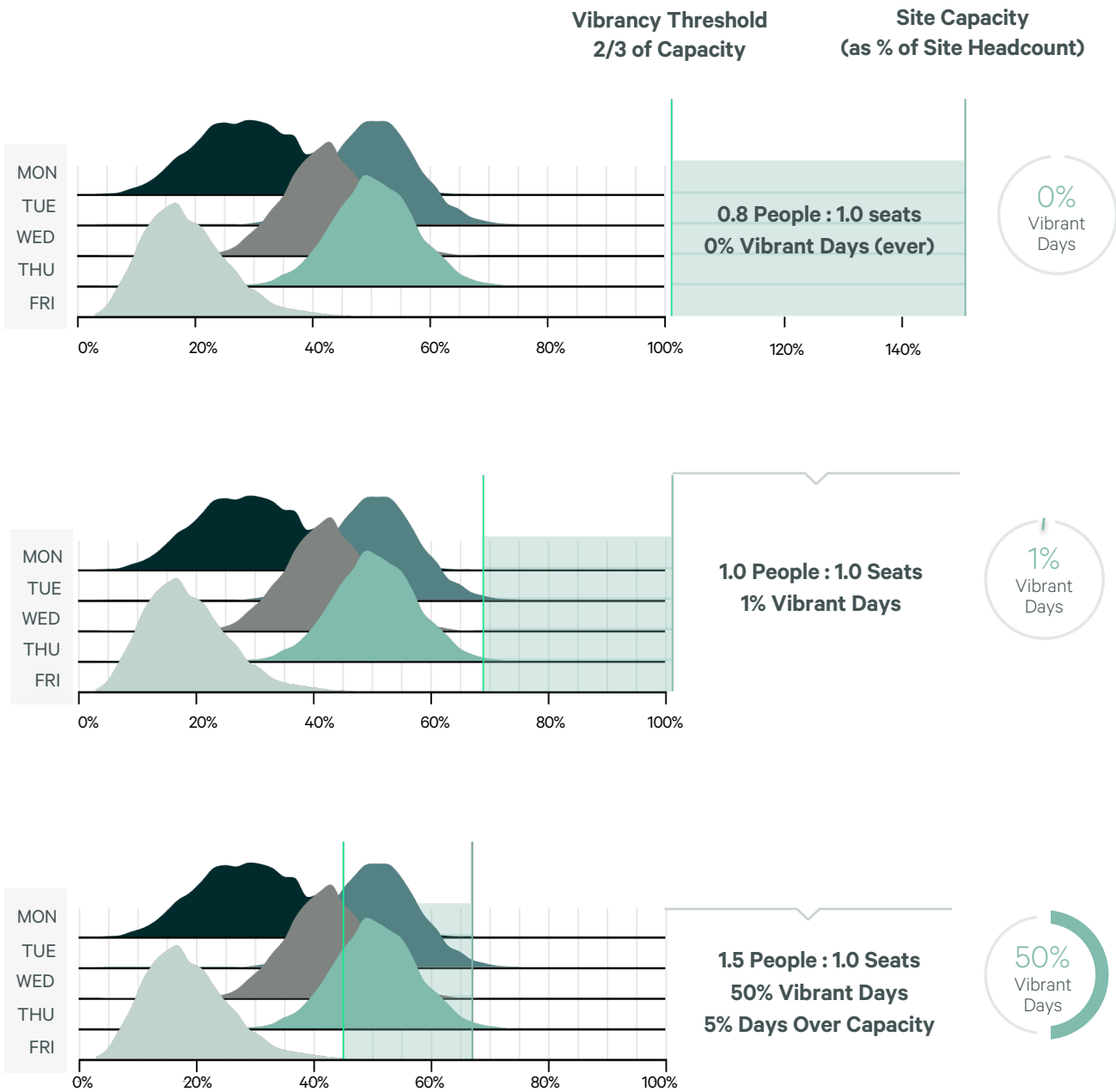
Achieving the right balance in office attendance by adjusting daily show-up rate and distribution of that demand across the week is critical to creating an exceptional on-site experience. This requires attention to both the fullness of the space (how many people show up on a given day) and accommodation for those workers on those days (how many seats, and what variety, are provided). As reflected in the diagram below, and consistent with most occupiers now constraining seat supply and creating shared workplaces, the optimal balance creates a more vibrant experience.

FIGURE 5: Measuring Office Vibrancy



Source: CBRE Consulting, 2024.

FIGURE 6: Recalibrate for Vibrancy



Source: CBRE Consulting, 2024.

Common Characteristics of Effective Hybrid Programs

Hybrid programs have several common characteristics that contribute to their effectiveness. A notable 70% prioritize investment in technology tools, ensuring that employees have the necessary resources to facilitate seamless collaboration, whether they are working remotely or in the office.

Sixty-six percent of hybrid programs emphasize the importance of change management and communication. These initiatives help to create a transparent and supportive environment, keeping employees informed and engaged during transitions.

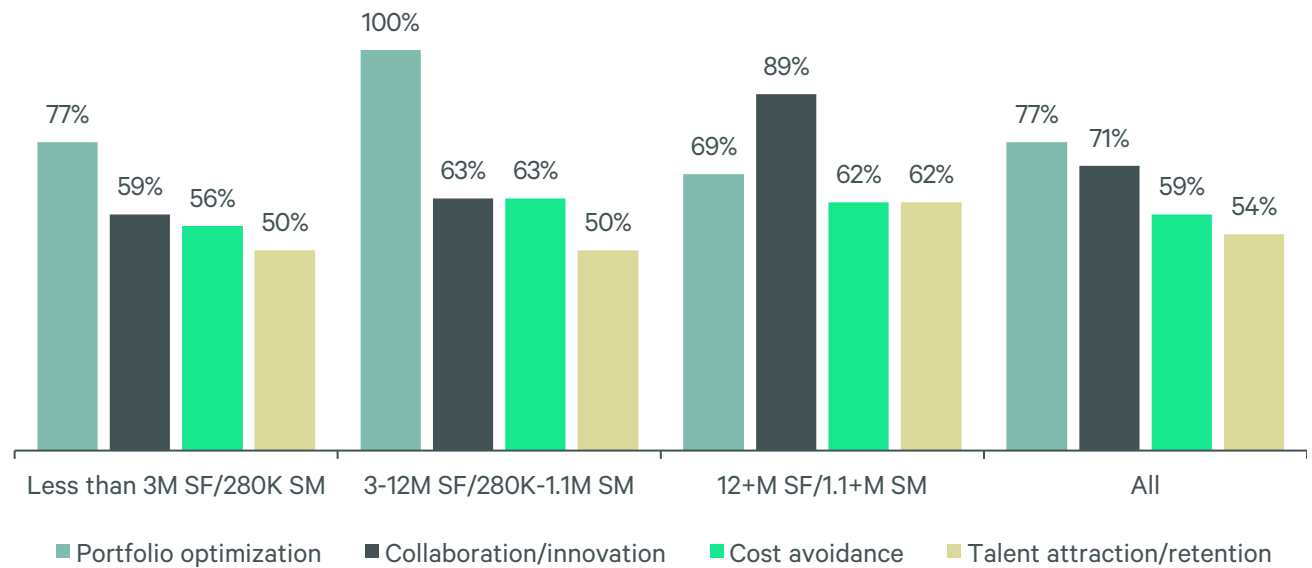
Hybrid programs that
prioritize investment in
technology tools

70%

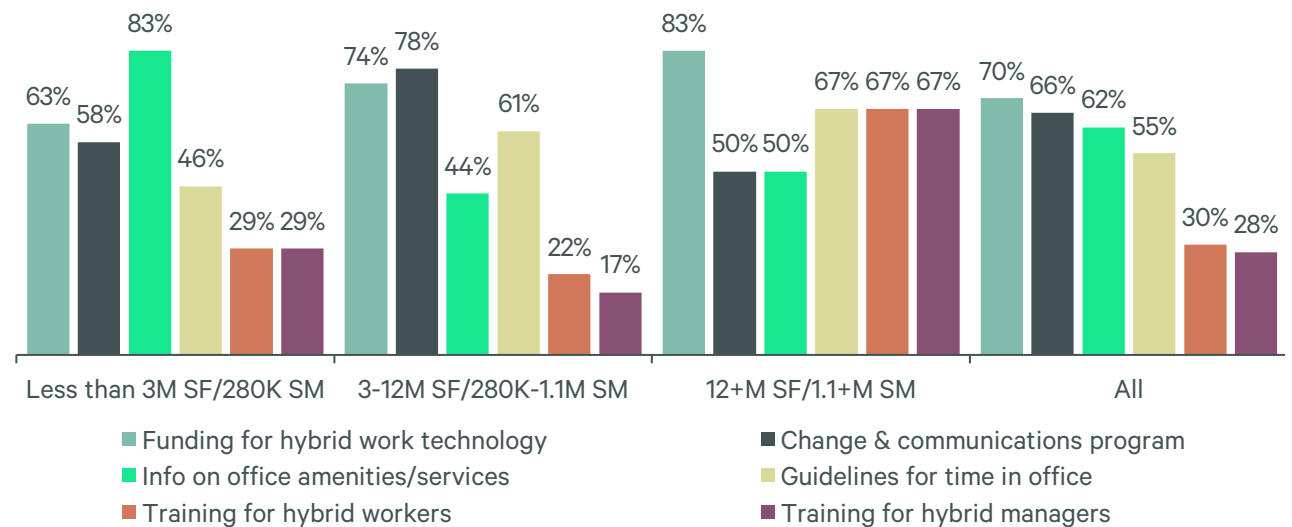


The data shows 62% of hybrid programs provide information about available office amenities and services, allowing employees to make data-driven decisions about where they work and what resources are at their disposal.

Besides these well-adopted common characteristics, both employees and managers still need significant training. This highlights an important area for improvement, as enhanced training programs can equip staff with the skills and knowledge needed to thrive in a hybrid work setting, leading to greater success for these programs. Addressing this gap will be crucial for organizations looking to optimize their hybrid work strategies, ensure sustained productivity and foster employee satisfaction.

FIGURE 7: What are the goals for supporting hybrid work?

Source: CBRE Workplace & Occupancy Benchmarking Program, 2024.

FIGURE 8: Which of the following is included in your hybrid work program?

Source: CBRE Workplace & Occupancy Benchmarking Program, 2024.

Alignment In Communications is Key

The gap between aspirational and actual office attendance has narrowed. The alignment between targeted (aspirational) and communicated (actual) policies has improved, with an average difference of just two percentage points in 2024. This has narrowed by three percentage points from 2023. This suggests organizations are becoming more cohesive in their hybrid work strategies, which is essential for long-term success.

Organizations that feel leadership expectations & employee behavior are in sync

39%



Evolving Workplace Needs

These patterns of attendance are changing the types of spaces employees require, the attributes of buildings companies prioritize and how space is managed.



Increase in Demand for Space to Perform Focused Work

Many employees find it challenging to fully separate their schedules into in-person and virtual days, leading to a rise in virtual or hybrid meetings when in the office. Remote work allowed employees to have significant control over environmental factors, such as acoustics, natural light and temperature. Adding more small, enclosed private spaces and meeting rooms is a growing requirement in workplaces that seek to replicate these conditions.

Demand for More Social and Collaborative Spaces

The most important amenity among in-office employees is other employees. The need to create more connected experiences in the office has led to a rebalancing of the physical environment to increase both amenity spaces and collaboration. With fewer days spent in the office, in-person collaborative work has become a focal point of the in-office experience. As such, demand for collaborative spaces has increased.

Prioritizing Connective Building Attributes

Organizations are now prioritizing training, mentoring and networking benefits when selecting office space. This trend has skewed preferences toward trophy office buildings equipped with social amenities that encourage people to gather—including roof decks, coffee bars and multipurpose rooms—located in vibrant neighborhoods. These attributes make in-office work more appealing and encourage employee engagement.

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Innovative Space Management

To adapt to these changing dynamics, companies are being more intentional in the experience they provide employees. This is being led by new hospitality-oriented roles managing the workplace, curating events and being attentive to employee (i.e., guest) needs in real time. These service models allow for seamless variability in space utilization, enhancing the overall employee experience. Additionally, they provide valuable feedback and data that organizations can use for future portfolio management. Advanced tools, like our Predictive Occupancy dashboard, further empower these models by offering real-time insights into space usage, enabling proactive adjustments to optimize employee engagement and operational efficiency. For example, using historical data such as weather conditions and holiday information to predict future occupancy trends, helps office administrators manage space utilization and plan for peak traffic times.

By leveraging data and prioritizing employee needs, companies can create a conducive work environment that balances flexibility with the benefits of face-to-face interactions.

Embracing the Hybrid Future

As we continue to navigate this hybrid work landscape, the interplay between flexibility and in-person collaboration will shape organizational strategies moving forward. By leveraging data and prioritizing employee needs, companies can create a conducive work environment that balances flexibility with the benefits of face-to-face interactions.

The hybrid work model is not just a temporary fix; it is a long-term strategy that will shape the future of work. Embracing this model enables organizations to remain competitive, attract top talent and foster a culture of collaboration and innovation. In this new normal, flexibility is key, and so is the recognition of the value that in-person connections bring to the workplace.



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